Project Business Case

Project Name	PeopleSoft CRM Enterprise HelpDesk
Project "Short Name"	CRM HelpDesk
Agency	Information Technology Department
Business Unit/Program Area	ITD, Customer Service Division
Type of Project	New Initiative/Feasibility Study
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Table of Contents

1. VERSION CONTROL 3

2. PROJECT DESCRIPTION 3

3. BUSINESS NEED/PROBLEM 4

3.1. Current Limitations and Expectations 4
  3.1.1. State of North Dakota ITD 4
  3.1.2. North Dakota University System 6

4. CONSISTENCY/FIT WITH ORGANIZATION'S MISSION 9

5. COST/BENEFIT ANALYSIS 10

5.1. Anticipated Benefits 10

5.2. Cost Estimate 11

5.3. Cost/Benefit Analysis 11

6. PROJECT RISKS 12

7. APPENDIX A: GLOSSARY OF TERMS 14

1. Version Control

Date	Author	Change	Reviewed and/or Approved by
9/29/2005	Justin Data	A number of wording changes/edits from Gary throughout. Also from Gary, addition of two new risks in risk section and additional NDUS-specific terms in the glossary.	Gary Vetter
10/4/2005	Justin Data	Section 3.1.1.1., added “minimal functional requirements” wording to the ITIL statement in the last paragraph.	Jerry Olson
10/4/2005	Justin Data	Section 3.1.2.2., improved the definition of SIRT.	John Underwood
10/4/2005	Justin Data	Section 4., removed wording stating that ITSM is not an enterprise solution and added wording that both CRM and ITSM would be fresh product installs. ITSM *is* an enterprise solution (HEAT is not).	Jerry Olson
10/4/2005	Justin Data	Section 5.1., added the benefit of sharing/transferring tickets across entities.	David Levenseller

2. Project Description

North Dakota State Government and the North Dakota University System (NDUS) are jointly engaged in a program called ConnectND. ConnectND is an implementation of PeopleSoft’s Enterprise Resource Planning (ERP) software which is leveraged to provide solutions for financial management, human resource management and student administration. Financial and HR management is state-wide; student administration is NDUS-specific.

As a part of the contractual agreement between the state of North Dakota and Oracle/PeopleSoft, ConnectND parties own a license for certain PeopleSoft components that are not a part of the original ConnectND implementation. One such component that the state owns the rights to use, but is not “in production,” is the PeopleSoft Customer Relationship Management (CRM) Enterprise HelpDesk Solution.

The intent of this business case is to justify the validity for implementing CRM HelpDesk across the enterprise, the initial stages of which being a pilot initiative of the project for the state’s Information Technology Department (ITD), and then an implementation across NDUS.

3. Business Need/Problem

Traditionally, some have viewed help desks as a barrier between “the customer” and “the techie.” These types of help desks are becoming extinct. They are being replaced by more customer-focused support systems. These systems are knocking down the customer-IT wall by infusing interpersonal skills, technical expertise and business awareness with an internationally recognized set of best practices – dubbed ITIL (Information Technology Infrastructure Library).

By combining the right toolset with skilled, motivated people and effective, efficient processes, State Government and Higher Education (NDUS) will be able to provide improved services such as logging and initiating customer work orders and requests for change, problem root-cause analysis and service-level management.

At ITD, an IT “Service Management Program” has been developed to coordinate this effort. The program currently has oversight to a Service Desk project that concentrates on *people*. Projects for “Incident Management” and “Change Management” also exist to focus on *process*. This PeopleSoft CRM Enterprise HelpDesk project is intended to tie people and process together with *technology*.

While less formalized for Higher Education, the goals are the same.

In order to move ahead, limitations of our current incident logging software systems – HEAT for ITD, NDUS Help Center (Remedy) for NDUS – must be overcome.

3.1. Current Limitations and Expectations

3.1.1. State of North Dakota ITD

3.1.1.1. Existing Incident Management Technology

Presently, a product from Front Range Solutions, called HEAT, is used for Incident Management by ITD. HEAT’s usefulness focuses on logging and tracking incidents. In this respect HEAT serves its purpose for now. However, next generation Service Desks such as ITD are trying to achieve will require additional, integrated solutions (above and beyond just logging incidents) in order to provide improved customer services such as Problem Management and Change Management.

Front Range has responded to industry needs in this respect with an upgrade to their existing product (now known as “IT Service Management”). Although this new product is attractive from a visual and usability standpoint, and it offers workflow and processes to support ITIL best practices, various “service modules” must be added onto a base product in order to support a complete service desk solution. Each additional module within this “Solution Family” also requires additional investments in software, licensing, set-up and ongoing maintenance and support.

CRM HelpDesk also supports the minimal functional requirements of the ITIL framework (PinkVerify Certification), plus the state owns a license and 10 years of maintenance for the HelpDesk, Self Service and Portal modules (including change management functionality). For this reasoning (and more) we expect that CRM HelpDesk will be a good launch pad on which to begin building out new service desk processes and procedures.

3.1.1.2. Methodologies

There are currently several projects underway within ITD to align its methodologies for service support and delivery with industry best practice. One such project is designed to take a holistic view of the processes and tools required to efficiently manage incidents.

The outcome of this analysis will require significant changes and enhancements of the existing HEAT incident management system.

Because CRM HelpDesk has been certified as an ITIL-compliant tool, we expect that it will help us support improved service desk methodologies.

3.1.1.3. Incident Management

The primary goal of incident management is to get people back up and running as effectively and efficiently as possible – thus minimizing the impact of incidents on the business.

In making the leap into service desk practices, we must take incident management further, into the realm of “Problem Management.” Problem management practices are designed to find the root cause of incidents and to initiate proactive action to prevent their recurrence across the enterprise.

Today, ITD does not make a distinction between incidents and problems. In order to mature its service support model and to align itself with industry best practices, however, ITD will need to develop formal Problem Management processes. This initiative will require a software system that contains, and is tightly integrated with, other service management components.

We expect that CRM HelpDesk’s native data relationships between business units and incidents logged will allow us to get to the information we need to start analyzing root problems.

3.1.1.4. Trouble Calls and Service Requests

ITD’s HEAT system is currently only used to manage trouble calls. A separate and independent “Work Management System” has been developed in-house to manage service requests. Because trouble calls and service requests follow such similar processes and share many of the same business requirements, industry best practice is to combine them into one integrated Incident Management System.

ITD views this as a critical part of providing a positive experience to its customers.

Although not yet fully functional, CRM HelpDesk contains a change management module that we feel could be used as the first step toward integrating trouble calls and service requests.

3.1.1.5. Change Management

ITD is presently working on an initiative for Change Management. The goal of this initiative is to ensure that standardized methods and procedures are used when introducing change into the "live environment." This project will undoubtedly require some type of software system to facilitate "requests for change" throughout the enterprise.

At this point in time, ITD does not have a system in place that can fulfill this requirement.

Our initial review of CRM HelpDesk shows promise in this area in its self service and change management components.

3.1.2. North Dakota University System

3.1.2.1. Background and History of the NDUS Help Center (Remedy) application

The NDUS Help Center application is an in-house application created using BMC/Remedy's Action Request development toolset. The application is designed to:

- Provide a problem tracking system for the IT support providers within the North Dakota University System
- Provide an asset tracking system for IT assets, including laptop and other check equipment
    - In particular, for IT assets that are leased or, for other reasons, are not in the administrative inventory system
- Provide a common solutions database to be shared throughout the NDUS

The NDUS Help Center application went into production the summer of 1998 and has had only one major upgrade performed to it in since then. The system is designed to be fault-tolerant, with duplicate servers running at NDSU and UND. If the primary goes down, it takes less than one hour to be fully operational again at the backup site.

3.1.2.2. New features and functionality needed

In 1998, the NDUS Help Center application's primary purpose was to allow NDUS campus IT support personnel to track IT-related problems reported to them. Since then, IT professionals with the NDUS have found many new uses that have allowed the individual campus or the system as a whole (all campuses) to become more efficient and effective in the support provided.

Some of these new uses include:

- Tracking reported SIRT issues
  - Security Incident Response Team – for those issues related to information and network security incidents
- SPAM abuses and copyright issues
- Service requests for Web pages or e-mail distribution lists
- Short-term equipment checkout
- Other uses not normally associated with a problem reported to a local campus help desk

Since the existing application was not designed with these uses in mind, ad-hoc workarounds are currently being used.

Having had no major upgrades to the existing system, there are many other features and functionality that have been requested, but that we have been unable to provide, e.g.:

- Web accessibility
- Client notifications sent to secondary people
- Additional client self-support

A complete rewrite of the NDUS Help Center application is needed to add the new features/functionality and to correct functionality that has changed since the application was first created.

BMC/Remedy has updated their application development tools to allow for more Web accessibility and other features/functionality that we are looking for – however, a complete rewrite of our current application is needed to take full advantage of these.

Being that moving forward with an updated toolset requires a re-write of the system – whether we upgrade or swap out the complete solution – NDUS has decided to leverage any synergies and/or economies of scale by working with ITD on a PeopleSoft CRM Enterprise HelpDesk implementation

4 Solution

- Undergo training sessions on CRM HelpDesk functionality
- Gather research from various resources (including Gartner) regarding the future of help desk and IT service management toolsets
- Perform high-level analysis of key state agency and university system help desk processes and needs
- Review capabilities and constraints of the PeopleSoft CRM HelpDesk
- Work with implementation consultant to assist in gauging feasibility of HelpDesk implementation and to help devise initial implementation roadmap
- Gather estimated implementation costs from potential vendor(s), university system and ITD staff
- Issue go/no-go for implementation pending analysis results
- Issue RFP/solicit PeopleSoft analysts/implementation specialists to assist in implementation
    - PeopleSoft experts will help ITD and NDUS make the right business decisions up front regarding CRM HelpDesk, ensuring we avoid as much as possible having to re-engineer products or processes later on
    - Consultant expertise will help us combine processes effectively with the toolset, as well as help us determine which processes should be changed or created anew
- Implement CRM HelpDesk (ITD)
- Pilot the product across ITD's service desk
- Roll NDUS into the fold
- Roll agency TBD into the fold (future phase)

4. Consistency/Fit With Organization's Mission

The CRM HelpDesk project is directly in line with the state's push to move toward providing centralized enterprise software when and where it is possible to do so (Strategic Plan 2005-2007/Objective F2-3: ITD will provide enterprise solutions to reduce duplication of systems). Additionally, from the NDUS perspective, the project is a logical addition to a PeopleSoft-powered student management solution. Other factors that place this project in line with ITD's and NDUS's missions include: HelpDesk meets the minimal functional requirements for ITIL compatibility (certified by third-party ITIL experts, Pink Elephant); HelpDesk and its related change management and customer self-service components are already "owned" by the state and by NDUS; and the product in general is a related product of the existing, overarching Enterprise Resource Management software that powers ConnectND.

Of course, the state could opt to purchase Front Range's new ITSM components in order to achieve the goal of fostering a best-of-breed Service Desk, but ITSM – as is CRM – is a new product installation. By leveraging CRM or ITSM, this project becomes a new installation of a new product.

Likewise, the NDUS could do a complete rewrite of the current application with BMC/Remedy Action Request or purchase BMC/Remedy's commercial Help Desk application. While either option would work, both would require substantial development time and would not provide the added benefit of having an integrated, homogeneous enterprise system from one vendor.

Front Range ITSM and CRM HelpDesk are both new products (to the state and to NDUS) that will require a fresh installation. So essentially, when looking at the state's and NDUS's next generation service desks, we are facing a blank slate from a toolset perspective.

Therefore, in which the state and NDUS are in the position to centralize applications and streamline processes across the "North Dakota Enterprise"; and in which the state and NDUS already own the licensing and maintenance plan for CRM HelpDesk to be used as an enterprise tool; and in which CRM HelpDesk provides process support for ITIL best practices that strategically the state and NDUS are trying to initiate; the analysts at ITD's Customer Service Division and at NDUS's Help Desk believe a PeopleSoft CRM Enterprise HelpDesk implementation is a logical and sensible project to initiate.

5. Cost/Benefit Analysis

5.1. Anticipated Benefits

- Improved customer service in fixing “problems”
    - Creation of centralized knowledge database that stores resolutions, allowing quicker solving of certain problems
        - Stores diagnostic tools such as trouble-shooting scripts, problem-solving techniques, and agent-recommended solutions
        - Better consistency of data
    - Better tracking of changes via change management module/process
    - “360-degree view” of the employee allows service agent to quickly and easily determine the correct solution to the employee’s query or issue
    - Solutions can be searched, weighted, ranked, or scored by accuracy
    - Skills-based routing system can automatically identify the agents who are best suited to solve specific issues
    - Manage correspondence to employees or contacts
- Potential productivity gains as a result of retooling processes and providing faster solutions data
- Eventual reduction in service desk calls by leveraging customer “self-service” capabilities – customers can find solutions to certain issues themselves
    - Relative cost per channel savings for self service is impressive:
        - Agent baseline cost is $6
        - Self service baseline cost is $1.50
        - *Source: Gartner Research, Chartwell Research, IBM Analysis*
- Process enforcement
    - Built-in and customizable process management standards allow better efficiency and regularity in handling incidents and resolving problems
- PeopleSoft platform provides single, integrated source of employee information
    - Agent can find employee-specific information about employee without having to log into multiple systems
- Role based access will allow sensitive data to be seen by only the appropriate people
- Multiple parties leveraging same help desk software system will allow for more efficient sharing or transferring of tickets between organizations (for example, if ITD and NDUS use CRM HelpDesk, transferring issues between groups becomes more efficient and easier to track)
- Notifications system helps keep appropriate people “in the loop” regarding issues

- Agencies and other affiliated entities can be brought into the CRM HelpDesk umbrella without purchasing additional licenses
    - There will still be implementation costs, however, for establishing a CRM HelpDesk set up for the agency. These costs will vary depending on the level of customization required for the agency
- Consolidation of service desk tools across the organizations that use the CRM HelpDesk tool
    - Single system for multiple parties provides centralized maintenance and upgrades
- May eventually be extended for use as a “citizen service” system for state government
- Outsourcing of services: Implementing CRM HelpDesk opens the door for ITD to “outsource” service desk solutions to agencies that have the need for a service desk, but not the resources to run one internally
    - Still maintains a centralized database
- Can leverage the existing investment in PeopleSoft staff to work on CRM HelpDesk
    - Software Engineers
    - Systems Architects
    - Governance body and processes
    - Training
    - Maintenance
- Tight integration with other PeopleSoft Enterprise Systems
- It is expected that down the road the Altiris asset management system will integrate with CRM
- In the long term may result in fewer help desks, which equates to lower overall operational costs
- Reporting capabilities can help flag “opportunities for improvement” in service desk operations

5.2. Cost Estimate

TBD pending analysis.

5.3. Cost/Benefit Analysis

TBD pending analysis.

6. Project Risks

- Balancing process standardization with flexibility for critical edge-case scenarios
    - We will need to architect the system/solution in such a way as to streamline certain processes and data, yet keep a certain amount of flexibility for agency-specific practices relating to sensitive data and/or unique process requirements
    - Speaking to the “right people” up front in the planning phase to make sure we strike that proper balance from a technical and process perspective is crucial. Failing in this realm could result in costly re-engineering needs down the road
- Reporting
    - As well as being critical about how business units are set up, we must keep a watchful eye on what types of data on which we need to report. To some extent this may drive how business units and other data structures are configured
- Hidden complexities
    - Up front we will be able to get a broad understanding of how different agencies (a.k.a., “business units”) should be configured in order to provide the appropriate balance of data sharing and data security across departments. The scope and complexity of this configuration (which will likely include a certain level of customization and/or modification to the base product), however, may change as the project deepens – with the potential to derail the initial budget estimate
- Hidden future maintenance costs
    - If it becomes required for too many customizations and/or modifications to be made to the system, the cost to perform upgrades increases. This is because during an upgrade all such enhancements are “wiped clean” and must be abstracted and reinstated from the previous code base
- Finding the right implementation partner
    - There are many consultants who will claim expertise in PeopleSoft CRM. It will be crucial for us, however, to partner with a firm that is expert in CRM *HelpDesk*
- Interfacing with structured e-mail
    - Various systems at ITD have been configured to generate structured e-mails that will cerate new incidents in HEAT. We have been told by a CRM HelpDesk consultant that CRM HelpDesk can also accept structured e-mails to some effect, but an additional PeopleSoft module may need to be integrated. This additional module may have additional costs. The alternative is to potentially re-write some e-mails as Web services, which would be time consuming and costly
- PeopleSoft system responsiveness

    - There have been some reports of system slowness while using PeopleSoft from ConnectND users. Trying to log tickets and operate within a help desk environment utilizing a slow tool would have a negative impact on customer service – as a user waits and waits while an agent tries to get to the proper screen to log information.
- The future of Oracle product direction
    - With Oracle having purchased PeopleSoft and Seibel, the door is open for speculation as to the absolute direction of future versions of the software feature set.
- Agencies may still choose to implement other toolsets
    - Planning, designing and implementing an enterprise solution require a significant time commitment from many parties. Individual agencies may be tempted to opt for their own “best of breed” solution as a quick way of meeting outstanding business requirements.

7. Appendix A: Glossary of Terms

Term	Definition
ITD	The State of North Dakota's Information Technology Department.
NDUS	North Dakota University System. The collective managing organization of North Dakota's 11 colleges and universities.
CRM	Customer Relationship Management. In this case, CRM is simply PeopleSoft's parent product under which the HelpDesk components operate.
HelpDesk	The name of the module in PeopleSoft CRM that is the primary component of the service desk solution.
ITIL	Information Technology Infrastructure Library. It is the most widely accepted approach to IT service management in the world. ITIL provides a cohesive set of best practices, drawn from the public and private sectors internationally. It is supported by a comprehensive qualifications scheme, accredited training organizations, and implementation and assessment tools.
OGC	Office of Government Commerce. A U.K. government organization that works with the public sector as a catalyst to achieve efficiency, value for money in commercial activities and improved success in the delivery of programs and projects. OGC is the primary think tank and organizational entity behind ITIL.
Pink Elephant	Pink Elephant is a privately owned technology consulting firm based in Toronto. Pink Elephant works to improve the quality of IT services through the application of established best practices, including ITIL.
PinkVerify	Pink Elephant's ITIL product certification. Getting this stamp of approval means that a product has been objectively assessed according to the criteria specified by the OGC and certified by a qualified Pink Elephant IT Service Management Consultant as meeting the minimum functional requirements to support the ITIL framework.
Front Range Solutions	FrontRange Solutions "develops software and services that allow organizations to deliver extraordinary customer relationships." Front Range is the producer of the HEAT and IT Service Management (ITSM) products.
HEAT	The current incident management solution in use by ITD and by some other state agencies.
ITSM	Front Range's next generation of service desk solutions that is in line with the ITIL framework.
BMC Software	A provider of enterprise management solutions for IT infrastructure management. BMC is the creator of Remedy, a customized version of which is currently in use by NDUS to manage help desk tickets.
Remedy	An IT service management solution by BMC Software.
NDUS Help Center Application	Project/common name of the customized Remedy solution used by NDUS.
Incident	Any event which is not part of the standard operation of a service and which causes, or may cause, an interruption to, or a reduction in, the quality of that service.
Problem	Unknown underlying cause of one or more incidents.

Term	Definition
Problem Management	Process that minimizes the effect on customer(s) of defects in services and within the infrastructure, human errors and external events.
Change	The addition, modification or removal of approved, supported or baselined hardware, network, software, application, environment, system, desktop build or associated documentation.
Change Management	Process of controlling changes to the infrastructure or any aspect of services, in a controlled manner, enabling approved changes with minimum disruption.